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ABSTRACT

Staff development is a basic and essential component of the continuing preparation of teachers, administrators, and other staff. It is one of the major issues facing educators today. The foremost issue in the 1990s is the challenge to expand the traditional emphasis on skill development to include focusing on how educators think and what educators do. This workbook provides the tools to help educators take an innovative approach to staff development. In seven chapters it outlines these basic staff development concepts: staff development readiness, getting started, assessment and planning, design and delivery, formative evaluation, followup support, and summative evaluation. Each chapter outlines the rationale or intent of the concept, methods and strategies to implement it, and a worksheet to assist in thinking and planning. (18 references) (RR)

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Staff Development:
The Key to School Renewal

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I. Introduction

Staff development -- a basic and essential component of the continuing preparation of teachers, administrators, and other staff -- is one of the major issues facing educators today. At the forefront of the staff development issue in the '90s is the challenge to expand the traditional emphasis on skill development to include focusing on how educators think and what educators do. Michael Fullan (1987) describes how educators think as their beliefs, philosophy, theories, knowledge base, and attitudes. He refers to what they do as their use of new skills, new materials, and new behaviors. This expanded focus of staff development beyond discrete skills will be the critical key to school renewal in this new decade and into the next century.

In her synthesis of research on staff development, organizational development, and educational change, M. Gail Shroyer (1990) defines staff development as "a comprehensive process of personal growth and self-actualization within the context of organizational growth and improvement" (p. 4). She offers some guidelines for staff developers that are in alignment with this contemporary view of staff development, and that correspond with the authors' view that effective staff development should:

- be part of a total effort to mesh school, subject area, and personal goals to meet the needs of students, teachers, administrators, school, district, and community
- be continuous and developmental as opposed to being one-shot, hit-and-run
- build on staff and organizational strengths to reduce weaknesses, rather than focus primarily on skill deficiencies
- increase organizational collegiality and collaboration and minimize staff isolation
- reflect adult learning theories by treating participants as professionals, building on their experiences, and offering a variety of delivery approaches
- encourage participation through various incentives such as improving competence, success, and advancement; increasing participation in decisionmaking; improving conditions in the school/district; and receiving release time or monetary rewards

- be based on sound theory and research that keeps educators abreast of effective instruction and effective schools, as well as preparing them for today's changing educational world

- receive strong administrative support to demonstrate importance and commitment

- encourage experimentation regarding teaching methods and materials and professional roles and relationships

- focus on creating satisfying and productive educational environments for children and adults.

In order to be effective, organizations must continually improve, and adults must continually learn and grow. Innovative staff development has the potential to create a culture in which learning is valued, individual contributors are recognized, staff members feel empowered, leadership is shared, communication is facilitated, and student achievement is high. This workbook provides the tools to help educators take such an innovative approach to staff development. It is designed to outline seven basic staff development concepts, and it raises a series of questions to stimulate thinking and provide a foundation for the creation of a successful staff development program.

Staff Development: The Key to School Renewal is divided into seven sections, including this introduction which presents contemporary views about staff development and provides a process for determining readiness to utilize this staff development approach. Section two focuses on getting started by identifying the staff development team and determining the staff development purpose. In section three, assessment and planning guidelines that include assessing needs and developing goals and objectives are presented. Section four presents the methodology for designing and delivering staff development, and includes discussions of instructional design and delivery of materials. Section five describes ways formative evaluation can enhance program operations, and describes evaluation methods and techniques. Section six presents some methods for follow-up assistance including a rationale, how to plan and arrange for follow-up, and strategies for making it a reality. Finally, in section seven, summative evaluation is discussed, including its purpose, methods, and how to develop a project summary report. The workbook concludes with a final note and a list of references.

RBS Staff Development Readiness Scale

For some educators, the expanded approach to staff development which underlies this publication may represent a radical departure from traditional inservice education. **Worksheet 1 - RBS Staff Development Readiness Scale** is provided, then, to help you determine how ready you and your organization are to implement a successful staff development effort based on this approach.

You can administer the worksheet to all members of the staff to assess whether the necessary readiness factors exist at the teacher, staff, and administrative levels. By assessing readiness for staff development, you will be better able to determine whether you and your organization are ready to proceed with this approach, or whether you need to do preliminary work. Such work could include awareness building concerning an expanded view of staff development, discussion among staff concerning perceived developmental needs and goals, or reviewing various staff development models. It is important to develop a consensus on both readiness and commitment before launching a serious effort.

The worksheet which follows includes 16 items which measure readiness. Each is a statement to which respondents indicate agreement or disagreement on a five-point scale. The items are separated into Part A and Part B sets for scoring. A combination of high Part A scores and low Part B Scores is interpreted as high readiness. Other combinations indicate a need for preliminary work. Scores may be calculated and interpreted for individuals or staff groupings, with appropriate implications.

Worksheet 1

RBS Staff Development Readiness Scale

Directions: Indicate the extent to which you agree with the following statements by circling the number on the line next to each statement which best describes your agreement or disagreement with the statement. Scoring directions are presented at the end of the scale.

		Strongly Disagree		Not Sure		Strongly Agree
1.	I am always willing to try out new ideas and activities, even if my current practices are working well.	1	2	3	4	5
2.	Staff development is best when conducted by outside experts in particular areas of the curriculum.	1	2	3	4	5
3.	I view learning and growth as essential to my effectiveness as an educator.	1	2	3	4	5
4.	In our organization, staff development activities have nothing to do with organizationwide goals and objectives.	1	2	3	4	5
5.	I am consistently involved in programs to learn something new.	1	2	3	4	5
6.	Staff development activities should be designed and developed by the administrators.	1	2	3	4	5
7.	Learning programs for adults should include activities that combine experiential activities and reflection.	1	2	3	4	5
8.	The best way to improve is to take educational courses at the local college.	1	2	3	4	5

Worksheet 1 - RBS Staff Development Readiness Scale (continued)

		Strongly Disagree		Not Sure		Strongly Agree
9.	I observe continuous development in my knowledge base and my skills as a result of staff development programs.	1	2	3	4	5
10.	In our organization, we find that staff development is most effective when it emphasizes skill development.	1	2	3	4	5
11.	If I were superintendent, I would work to ensure that staff development was an ongoing part of the school's culture.	1	2	3	4	5
12.	The only reason an organization needs to think about improvement is if its present level of functioning is not acceptable.	1	2	3	4	5
13.	In our organization, staff development prepares us for today's changing educational world.	1	2	3	4	5
14.	We do not take time in our organization to plan systematically for staff development.	1	2	3	4	5
15.	Differences in learning styles are as important in planning staff development programs for adults as they are for students.	1	2	3	4	5
16.	Our staff members are not qualified to design and deliver staff development programs.	1	2	3	4	5

Worksheet 1 - RBS Staff Development Readiness Scale (continued)

Scoring Directions: Write your response to each statement on the lines below, then add up each column.

Part A	Part B
1. ____	2. ____
3. ____	4. ____
5. ____	6. ____
7. ____	8. ____
9. ____	10. ____
11. ____	12. ____
13. ____	14. ____
15. ____	16. ____
TOTAL ____	TOTAL ____

Interpretation: If you have a high score for Part A (24-40), AND a low score for Part B (0-16), you are ready to begin the kind of staff development advocated in this publication. Other combinations mean you probably need to do preliminary work before engaging in a staff development effort of this type.

II. Getting Started

You have been called upon to provide staff development for your organization. You are committed to a staff development process that will facilitate growth for the staff and the organization. Now, where do you start? How do you start? Getting started is often the hardest step. With busy schedules and multiple responsibilities, you may be tempted to use the most convenient plan possible. However, the desired outcome -- personal and organizational growth and development -- is too crucial to shortchange for the sake of getting into motion.

As educators, we are used to working in isolated situations and, too often, our tendency is to take on large tasks single-handedly. If you are of that mindset, it's a good time now, at the beginning of this staff development process, to reconsider that notion.

There are several functions to perform throughout the various stages of this process. In the planning stage, needs must be assessed and goals and objectives must be established (ASTD, June 1986). Then, the design and delivery stage includes determining the order in which skills or information are to be taught, identifying instructional strategies, and involving participants in meaningful learning activities (ASTD, April 1986). Next, the follow-up phase calls for addressing workplace implementation and application of skills and knowledge gained from a learning event (ASTD, January 1986). Finally, evaluation (both formative and summative) requires reviews of program materials, participant opinions, instructor opinions, and on-the-job performance/outcomes (ASTD, March 1988).

Before organizing your plan for staff development, it is suggested that you complete some preliminary tasks. Two important steps are presented here for you to consider.

Identifying the Staff Development Team

As you think about these staff development stages, think about whose help should be solicited to ensure that the necessary functions are performed. Consider who will be best suited for helping at each stage. Identify those people who have the expertise, time, commitment, and energy to play an integral part in the process. Use **Worksheet 2 - Getting Started Guide** at the end of this section to write in the names of people who may be available to work with you. From this list, select key people to be part of your preliminary team and assist with guiding the overall process.

Determining the Purpose of Staff Development

Why are you doing staff development? What do you hope to accomplish overall? What goal does staff development address within the organization? These are crucial questions you should consider during this getting-started period. As you consider these questions, you will begin to determine your purpose for staff development.

By determining the purpose of staff development, you provide a clear vision, a set of values, and a sense of direction for everyone involved. Putting it in writing makes your purpose statement tangible. It clearly sets down goals, values, and practices and establishes an image for all to see (Pascarella & Frohman, 1989).

Like the guidelines for staff development that were listed in the Introduction, your purpose statement should include values, beliefs, and practices that reflect the organization's principles about staff development. The purpose statement should take a stand about staff development and become the driving force for all activities initiated by the staff development team.

Think about the following questions to help you shape the staff development purpose statement and answer them on **Worksheet 2 - Getting Started Guide:**

- What staff development factors are important to current and long-term organizational success?
- What organizational goals will staff development help prepare participants to meet?
- What values and beliefs will drive all staff development practices?

Worksheet 2

Getting Started Guide

Identifying the Staff Development Team

For each of the staff development functions below, list the names of people who may be available to help you. Initially this list may be incomplete, but names can be added (or deleted) as the staff development process progresses.

1. Planning

_____

_____

_____

2. Design and Delivery

_____

_____

_____

3. Follow-up

_____

_____

_____

4. Evaluation

_____

_____

_____

Identify those people who have the necessary expertise, time, commitment, and energy. From this group, select the preliminary team to guide the overall process. Remember, the composition of this team may change as you move through the various staff development stages.

5. Staff Development Preliminary Team Members

_____

_____

_____

_____

_____

Determining the Purpose of Staff Development

Now, answer these questions about your staff development purpose and prepare your purpose statement.

6. What staff development factors are important to current and long-term organizational success?

_____

_____

_____

_____

_____

7. What organizational goals will staff development help prepare participants to meet?

_____

_____

_____

_____

_____

8. What values and beliefs will drive all staff development practices?

9. Write your staff development purpose statement here.

III. Assessment and Planning

Now that the team is established and the staff development purpose is determined, it is time to start the assessment and planning process. How are you going to carry out the purpose? The first step is to assess the needs of those people within the organization who will be affected by the staff development process. Information obtained using a thorough needs assessment will help you to define your goals and specify the training objectives. This section describes the needs assessment process and how to incorporate resulting information into workable goals and objectives.

Most of us think of needs assessment as a process of asking people what is missing. This deficiency model of needs assessment can provide only a short-term fix for staff development initiatives. Orlich (1989) asserts that the needs assessment process should help to establish a consensus for a direction, rather than magnify staff development deficiencies. With the conception of staff development including a long-range purpose with broad implications and positive impacts, a new perspective of needs assessment is required.

The Intent of Needs Assessment

Defining the needs of the organization is predicated upon recognizing the gap between what could be and what is. In other words, "needs assessment is the systematic search for details about the difference between optimal and actual" (ASTD, February 1985, p. 11). Taking a look at this opportunity for growth places needs assessment in a positive light. Where can the organization and staff go? What growth can be expected? How can your plans for staff development accomplish the long-range goals of the organization?

Take time to reflect on the situation at hand. Within the context of your staff development purpose, answer the following questions on **Worksheet 3 - Assessment and Planning Guide** to determine what the needs assessment should cover.

- What are the objectives of the needs assessment: to determine perceived differences between actual and optimum performance; to identify unmet concerns; to set priorities for future actions; to determine attitudes about a subject, new system, or technology; to uncover the cause of a problem?

- What are the expected outcomes, or, what will things look like when you have succeeded: new beliefs, new attitudes, new behaviors, new skills, new products?

Defining the needs assessment objectives in light of your staff development purpose will enable you to pinpoint the issues to assess and the individuals who can provide you with the needed information. With an understanding of the intent of needs assessment and its place in the staff development process, consider the steps involved in conducting an efficient and successful needs assessment.

The Process of Needs Assessment

The needs assessment process should be a simple, step-by-step procedure to provide the information you need to design the staff development program. While there are many suggested specific procedures for needs assessment (Orlich, 1989; Laird, 1985; Knowles, 1980), the following list of general steps captures the important elements across various approaches:

- Define the target population to assess.
- Select the data gathering methods.
- Collect and analyze the data.
- Utilize the results.

Each of these steps is discussed below. At the end of each step, use **Worksheet 3 - Assessment and Planning Guide** to help explore and record the information you need for each step in the needs assessment.

Define the Target Population

It is important to identify the best target audience for needs assessment. Who will be able to provide the information you need: staff, administrators, students, parents, community members? Who will benefit from the staff development process? Who will take part in the process? Who will be affected by the outcomes? Answer these questions to select the population who will be most able to provide you with helpful data.

Select the Data Gathering Methods

Information for needs assessment can be gathered through a wide range of techniques and approaches (McMillan & Schumacher, 1984). Each method has advantages and disadvantages which make it more or less able to respond to your

intent for the needs assessment. Here are some examples of data gathering methods:

- **Questionnaires** -- "Variety of approaches in which the subject responds to written questions" (McMillan & Schumacher, 1984, p. 29). "It is the most widely used technique because it is economical, can assure anonymity, and questions can be written for specific purposes" (p. 140).

- **Interviews** -- "Asks the subject to respond to oral questions (and) provides flexibility and the ability to probe and clarify responses" (p. 30). "It provides a high response rate but is costly and more susceptible to bias" (p. 165).

- **Tests** -- "The use of an instrument to measure knowledge, ability, aptitude, or some other trait in a competitive situation" (p. 29).

- **Observations** -- "A particular data gathering technique in which the researcher directly observes, visually and auditorily, some phenomenon and records the resulting observation" (p. 28). This technique "is not a casual informal assessment; it involves training observers and recording procedures can be quite complex" (p. 29).

- **Unobtrusive Measures** -- Use "nonreactive measures to collect data without disruption of a naturally occurring event" (p. 166). "Examples of unobtrusive research include counting the number of books checked out as evidence that a publicity campaign to use the library was effective, or assessing the number of discipline problems by counting the number of referrals to the principal's office" (p. 33).

- **Document Reviews** -- Involves the use of "records of past events that are written or printed: letters, diaries, tax records and receipts, maps, journals, newspapers, court records, official minutes, regulations, laws, and the like" (p. 30).

Whichever method or combination of methods you select for the needs assessment, it is important to make sure that the method is both valid (measuring what it is supposed to measure) and reliable (consistent over time and over items). Field test each method whenever possible, and keep any instruments simple and easy to answer.

Collect and Analyze the Data

As you prepare to conduct the needs assessment, consider the following questions that will help you focus on some practical data collection issues:

- When and where will the data be collected?
- Who will collect the data?
- What preparation will data collectors need?
- How much data will be collected?

After you have collected the data, they must be structured into meaningful sets of information that can be interpreted and summarized. This process of analyzing data relies on procedures that may be either quantitative or qualitative (McMillan & Schumacher, 1984). Some of the methods described above lend themselves more to quantitative analysis (e.g., tests, questionnaires), while qualitative procedures may be better for others (e.g., interviews, observations). Quantitative analysis is a method of organizing and analyzing data numerically. The first step is to characterize events, qualities, or other variables in a numeric format using ratings, categories, or scores. Then, summarize and describe the findings as answers to the questions asked by the data collection instruments. The complement to quantitative analysis is qualitative analysis, which presents data in narrative form. The analyses are performed on collected narrative descriptions of events, qualities, or other variables which are related to the needs assessment questions. Through qualitative and quantitative analysis, themes or trends in the data are identified. Both data analysis procedures can be systematic, purposeful, reliable, and valid. Both are useful for helping to transform your raw data into an easy-to-understand summary of needs. Key questions regarding data analysis issues include:

- What data analysis procedures will you use?
- Who among your team possesses data analysis skills?
- After your data are analyzed, what format will you use to report your findings?

Utilize the Results

This step is the "payoff" for needs assessment. In the staff development context, utilization means applying the results to program design. This part of the process is described in the section below.

Incorporating Results into Staff Development Goals and Objectives

What do the needs assessment results tell you? Where do they fit into your staff development process? What are the new horizons to be pursued? What gaps have you uncovered in your organization? Where do you need to direct your design and development energies? Having defined your purpose and determined the needs, you are now ready to write staff development goals and set objectives which will enable you to accomplish this purpose.

The question you have to answer now is, "What is the overall end result you wish to achieve through this staff development process?" Answering this question requires you to translate the needs assessment findings into workable goals that describe what you plan to do to address the issues. A goal is defined as the desired overall outcome. It should be specific, realistic, observable, and measurable (Miller, 1987), and it should reflect your overall purpose for providing staff development. Review the needs assessment data and answer the following questions to help you identify your goal:

- What is the expected outcome of staff development? Change in individual competence? Improvement of collective behavior? Altering of an individual's role? Development of a cadre of specialized trainers? (Orlich, 1989)

Now that you've identified your goal, take a look at the objectives you want to accomplish. Objectives are the specific results you wish to attain within the staff development goal. They are more specific statements that determine **how** your goal will be accomplished. Think about these questions as your prepare your staff development objectives:

- What objectives describe the **performance** or **behaviors** that the staff development is expected to produce?

- What objectives indicate the **knowledge** or **skills** intended as a result of staff development?

- What objectives specify the **type of training** activity required for staff development?

This planning process helps to ensure that your purpose, needs, goals, and objectives are properly aligned and it provides you with direction for the design and development of your program. Complete **Worksheet 3 - Assessment and Planning Guide** in preparation for the next step in this staff development process.

Worksheet 3

Assessment and Planning Guide

The Intent of Needs Assessment

1. What are the objectives of the needs assessment?

_____

_____

_____

2. What are the expected outcomes?

_____

_____

_____

The Process of Needs Assessment

3. Who is the target population for your assessment?

_____

_____

_____

4. What data gathering methods will you use?

_____

_____

_____

Worksheet 3 - Assessment and Planning Guide (continued)

5. When and where will the data be collected? Who will collect the data? What preparation will data collectors needs? How much data will be collected?

6. What data analysis procedures will you use? Who among your team possesses data analysis skills? After your data are analyzed, what format will you use to report your findings?

Incorporating the Information into Staff Development Goals and Objectives

7. What has this process of needs assessment told you? What gaps have you uncovered in the organization? What staff development issues have surfaced?

Worksheet 3 - Assessment and Planning Guide (continued)

8. What is the expected outcome of staff development? Change in individual competence? Improvement of collective behavior? Altering of an individual/s role? Development of a cadre of specialized trainers?

_____

_____

_____

_____

_____

_____

9. Write your st development goal(s) here.

_____

_____

_____

_____

_____

10. What objectives describe the **performance** or **behaviors** that staff development is expected to produce?

_____

_____

_____

_____

_____

_____

11. What objectives indicate the **knowledge** or **skills** intended as a result of staff development?

12. What the objectives specify the **type of training** activity required for staff development?

13. Write your staff development objectives here.

IV. Design and Delivery

When considering staff development, the first thought is often of the actual program to be presented. Trainers are visualized in front of an audience conducting a workshop or training program. For that reason, this section may be the most familiar to the reader. Yet, as seen from the previous sections, designing and delivering the program is only one part of an overall process that is intertwined with the long-range purpose. In this section, instructional design and delivery of material are discussed.

Instructional Design

What important considerations are there to review for the design of your program? The steps below will help to answer critical sequence and strategy questions and help you to design an effective and enjoyable learning event.

The first step calls for you to think about some sequence and strategy issues (ASTD, March 1988). Sequence refers to the order in which skills or information is taught, and it deals with the logical order for presenting learning events. Strategies are the training methods and media that will be used throughout the staff development program. Consider how you will deal with these sequence and strategies questions and write the answers in **Worksheet 4 - Design and Development Guide**:

- How will the learning events be structured to address your staff development objectives? What will participants learn first, second, third...?
- How many hours/days will be built into the staff development program?
- How many participants will attend the program?
- How often will the program be offered?
- How will the program include on-the-job training, classroom instruction, lab instruction, or self instruction?
- How will the program use textbooks, workbooks, computers, interactive videodiscs, or videotapes?

The second step is to select the instructional methods and materials that best suit the participants, content, and objectives. Designers need to consider the

variety of adult learning styles (Lawler, in press) and address participant needs by selecting a variety of instructional methods and materials. Some of the methods and their descriptions are provided in Figure 1.

The selection of training materials requires a similar scrutiny. The list below provides examples of training materials you may want to consider:

- participant guides
- textbooks, manuals, workbooks, and handouts
- computer software
- audio and video tapes
- instructor guides (including lesson plans)
- trainee evaluation materials (tests, lab exercises, assessment checklists)
- program evaluation materials.

When considering methods and materials, think about those that are comfortable for your instructors and reflect their expertise. Also, think about the time allowance and available resources. Remember, too, that some methods will require the use of audio-visual equipment, handouts, hands-on materials, changeable room space, and other presentation aids.

Taking all of these issues into consideration, answer the following questions in **Worksheet 4 - Design and Delivery Guide**:

- What training methods will be used during the staff development program?
- Will the training methods selected complement the size of the training groups?
- Can ready-made materials be used from previous programs or from outside vendors?

Figure 1

Staff Development Instructional Methods*

Activity	Description	Group Size	Caution
Lecture	A talk by the presenter to transmit a large amount of information with little or no discussion	Any size group, preferably large	Too much, too long -- can be boring.
Reading	Assignments of material to be read in or out of class	Any size group	People have different reading levels and speed.
Demonstration	Manipulated activities or pictures which illustrate lecture	Medium size group	Make sure everyone can see.
Panel Discussions	Short lectures by a variety of people	Large size group	Make sure panelists' topics are appropriate.
Structured Discussion	Predefined objectives for discussion by group, directed by leader	Small group	Keep participants on target.
Question/ Answer	Participants encouraged to ask questions throughout	Medium size group	Leader should be well versed in content and group process skills.
Brainstorming	Group free-associating within specific guidelines to generate a large list of pertinent information; usually used in problem solving situations	Small group	Make clear the rules of brainstorming and leader should be versed in group process.

Figure 1 (continued)

Activity	Description	Group Size	Caution
Case Study	An account of a problem situation which allows the group or individual to analyze the problems and propose solutions	Small group	Case study should reflect issue pertinent to content.
Exercise	A short activity that incorporates a content issue; can be a starting point for group discussion	Medium size group	Exercise should reflect issue pertinent to content and level of participants.
Role Play	A problem from "real life" is presented and participants act out the situation; discussion and analysis promotes understanding of previous behavior; opportunity to practice new skills	Small group	Participants may be uneasy with acting.
Video/Film/ Slides/Film strip	Product presenting information related to content in a more elaborate manner	Medium size group	Make sure everyone can see.

*This figure is compiled from information in Harris (1989) and Lawler (in press).

- Who will provide the training? What role will they play in the instructional design activities?

- What evaluation materials should be developed during this design stage? Trainee evaluations? Documentation materials? (See sections on formative and summative evaluations for more detail.)

Instructional Delivery

Trainers and instructors know that you have covered all the bases if you are organized, well-prepared, knowledgeable of the content, and conscientious about matching methods and materials with the audience (ASTD, June 1985). Included in this understanding is the knowledge that mastering of effective delivery techniques is a must.

Good presenters deliver their material in a clear, concise manner and use language geared to the comprehension levels of their audience. They are enthusiastic about their topics and take every opportunity to project this excitement. Successful trainers demonstrate concern for the comfort level of their participants. They tell learners what is expected of them, use humor to put learners at ease, and encourage contributions to the instructional process. Whenever possible, they work with the trainees on a one-to-one basis to help individual learners progress or overcome problems. They also provide practical applications of their training by showing learners how they can use their new knowledge or skills on the job. Effective instructors know that a good learning environment contributes to their success, so they provide adequate seating, low-glare lighting, sound amplification, and appropriate temperature controls.

The following questions can serve as a checklist for effective delivery techniques. Answer these questions in **Worksheet 4 - Design and Delivery Guide**:

- Will the selected learning environment provide adequately for the participants, methods, and materials?

- What provisions can be made to ensure that presenters speak clearly and loudly enough for learners to hear everything they say? Their tone is relaxed and natural? Their mannerisms and expressions will be engaging rather than distracting?

- Will presenters include an introduction that breaks the ice and orients learners to the staff development objectives?

- What provisions can be made to ensure that presenters take note of verbal and non-verbal cues to determine whether participants are listening to and understanding the message? That based on these cues, presenters will make adjustments in the length, pace, and activities of the presentation?

- What provisions can be made to ensure that presenters show learners respect for their experience and contributions?

- How will summaries of key ideas be provided at the end of the presentation?

- How will feedback from participants be solicited to evaluate the presentation?

A well thought-out plan, utilization of these guides, and your own enthusiasm for staff development can build your confidence as you develop the design and prepare for delivery. A basic understanding of adults as learners also will act as added insurance in producing an effective program. Adults are eager to learn when they have a comfortable setting, when they are treated with respect, when their experience is valued, and when they see the connection between the new learning and its intended results.

Worksheet 4

Design and Delivery Guide

Instructional Design

1. How will the learning events be structured to address your staff development objectives? What will participants learn first, second, third...?

_____

_____

_____

_____

_____

_____

2. How many hours/days will be built into the staff development program?

_____

_____

_____

3. How many participants will attend the program?

_____

_____

_____

4. How often will the program be offered?

_____

_____

_____

Worksheet 4 - Design and Delivery Guide (continued)

5. How will the program include on-the-job training, classroom instruction, lab instruction, or self-assessment?

_____

_____

_____

6. How will the program use textbooks, workbooks, computers, interactive videodiscs, or videotapes?

_____

_____

_____

7. What training methods will be used during the staff development program?

_____

_____

_____

8. How will the training methods selected complement the size of the training groups?

_____

_____

_____

9. Can ready-made materials be used from previous programs or from outside vendors?

_____

_____

_____

_____

_____

_____

Worksheet 4 - Design and Delivery Guide (continued)

10. Who will provide the training? What role will they play in the instructional design activities?

_____

_____

_____

_____

_____

_____

11. What evaluation materials should you develop during this design stage? Trainee evaluations? Documentation materials?

_____

_____

_____

_____

_____

_____

Instructional Delivery

12. Will the selected learning environment provide adequately for participants, methods, and materials?

_____

_____

_____

13. What provision can be made to ensure that presenters speak clearly and loudly enough for learners to hear everything they say? Their tone is relaxed and natural? Their mannerisms and expressions will be engaging rather than distracting?

_____

_____

_____

Worksheet 4 - Design and Delivery Guide (continued)

14. Will presenters include an introduction that breaks the ice and orients learners to the staff development objectives?

_____

_____

_____

15. What provision can be made to ensure that presenters take note of verbal and non-verbal cues to determine whether participants are listening to and understanding the message? That based on these cues, presenters will make adjustments in the length, pace, and activities of the presentation?

_____

_____

_____

16. What provision can be made to ensure that presenters show learners respect for their experience and contributions?

_____

_____

_____

17. Will summaries of key ideas be provided at the end of the presentation?

_____

_____

_____

18. How will feedback from participants be solicited to evaluate the presentation?

_____

_____

_____

V. Formative Evaluation

Staff development does not end with the delivery of the program, especially for those interested in long-term change. Development is an iterative process in which assessing, delivering, and evaluating continually occur. Within this framework, evaluation is more than just a measure of a "good time" or "an invigorating presenter." Evaluation is an ongoing practice of identifying the strengths and weaknesses of the staff development process. It provides continual input into developmental activities and planning for the future.

There are two general categories of evaluation: formative and summative. "Formative evaluation is designed to provide ongoing feedback as quickly as possible" (Orlich, 1989, p. 61). "Summative evaluation is conducted as the final assessment of a project (or part of a project)" (p. 62). This section addresses formative evaluation and the role it plays in staff development.

The Intent of Formative Evaluation

Formative evaluation provides an opportunity to assess how staff development is being implemented in order to make improvements or changes. Evaluation findings increase understanding of the staff development process and provide direction for future programs. Carrying out an evaluation can ensure that:

- staff reactions and perceptions are obtained
- adjustments can be made as needed
- successful activities can be identified for future use
- effective presenters can be identified and used again
- ineffective presenters are not reused.

Formative evaluations allow for identification of problems throughout the staff development process. This continual checking can be built into the staff development process so that feedback is available when it is needed most.

You've been asked to think about evaluation at all stages of this staff development process. Review each step of your plan and consider what questions you want to ask as the staff development process occurs. Think about your staff development purpose. Think about how you will know that staff development is contributing to the goals and achieving the objectives. Decide what information is

needed and determine your intent for formative evaluation. Write your answers in **Worksheet 5 - Formative Evaluation Guide**. With this understanding of your formative evaluation intent, you are ready to select an evaluation method that best fits your staff development process.

Formative Evaluation Methods

The first step in method selection is to take a look at the staff development process and decide what, specifically, you want to assess through evaluation. Use **Worksheet 5 - Formative Evaluation Guide** to explore and record what you want to assess.

- Do you want to know how well the staff development process met program objectives and delivered content?
- Are you interested in the delivery and presentation methods?
- Is the instructor's performance an important element to assess the success of the process?
- Are you assessing the participants' learning?

Another consideration prior to selecting the methodology deals with what you will do with the information obtained. Review the following questions, which can provide you with a framework for the evaluation and keep you on target.

- For whom is the evaluation information intended?
- What does this audience want to know?
- How will they use the information?

Your next step is to select an appropriate method to conduct the evaluation. Joyce and Showers (1988) acknowledge that there is an impressive array of evaluation methodology and instruments from which to choose. They suggest seeking expert consultation when designing extensive evaluations, since the development and validation of evaluation instruments is a highly technical field. They recommend, also, using a variety of techniques to ensure collection of valid information, especially in cases where sophisticated instruments are unavailable. Consider the following evaluation methods:

- interviews
- observations
- questionnaires
- document analysis
- assessment of organizational climate
- tests of participant learning
- debriefing sessions
- focus groups.

After you select the method or methods, take time to try it out. Interview schedules, observation guides, or questionnaires need to be field tested to determine if they are providing the information you want. Test the instruments to make sure they fit the needs of the staff development process.

When you are ready, collect and analyze the evaluation data. In considering this step you will need to focus on the following questions. Take time to answer these questions in **Worksheet 5 - Formative Evaluation Guide**:

- When will the data be collected?
- How will the data be analyzed?
- Who will analyze the data?
- How will the data be presented to the audience?
- What recommendations will you make as a result?

Formative evaluation can be a quick "smile sheet" at the end of a program to determine how participants feel at that moment. Or it can be a more extensive assessment of the strengths and weaknesses of the entire staff development process. Within the framework of your long-range purpose, it is crucial that you continually observe, assess, and evaluate the staff development process for refinement.

Worksheet 5

Formative Evaluation Guide

The Intent of Formative Evaluation

1. What is your staff development purpose?

   _____

   _____

   _____

2. What is your staff development goal?

   _____

   _____

   _____

3. What are your staff development objectives?

   _____

   _____

   _____

4. What information is needed for you to know that your staff development process is contributing to the organizational goals and achieving your learning objectives?

   _____

   _____

   _____

   _____

   _____

   _____

Worksheet 5 - Formative Evaluation Guide (continued)

5. What is your intent for evaluation?

_____

_____

_____

Formative Evaluation Methods

6. Do you want to know how well the staff development process met its program objectives and delivered content?

_____

_____

_____

7. Are you interested in the delivery and presentation methods?

_____

_____

_____

8. Is the instructor's performance an important element to assess the success of the program?

_____

_____

_____

9. Are you assessing the participants' learning?

_____

_____

_____

Worksheet 5 - Formative Evaluation Guide (continued)

10. For whom is the evaluation information intended?

_____

_____

_____

11. What does this audience want to know?

_____

_____

_____

12. How will they use the information?

_____

_____

_____

13. Which methods will you use?

_____

_____

_____

14. When will the data be collected?

_____

_____

_____

Worksheet 5 - Formative Evaluation Guide (continued)

15. How will the data be analyzed?

_____

_____

_____

16. Who will analyze the data?

_____

_____

_____

17. How will the data be presented to the audience?

_____

_____

_____

18. What recommendations will you make as a result?

_____

_____

_____

VI. Follow-Up Support

We have been looking at staff development as a long-range process intended to provide opportunities for growth and learning within the organizational framework. This process, however, would be inadequate without considering follow-up assistance to participants. This section provides a rationale and plan for this usually forgotten stage of the staff development process and offers suggestions for conducting follow-up activities.

The Rationale for Follow-Up Support

Follow-up assistance and support are as important as the initial training itself. Participants are likely to return to their old behaviors and old ways of thinking shortly after training without a systematic follow-up plan and continued support for new actions and attitudes (Burden, 1990). Follow-up, then, is crucial and should be recognized as a significant component in the staff development process.

Planning and Arranging for Follow-Up

Planning for follow-up support begins at the initial stage and continues throughout the staff development process. Take a look at your purpose, goal, objectives, designs, and delivery methods, then consider how you can assist, support, and reinforce the learning that has occurred. Focus on the following questions to construct an effective support system and write your responses in **Worksheet 6 - Follow-Up Support Guide**:

- What provisions need to be made in the organization to establish follow-up assistance?
- What changes in thinking, perceptions, and organizational culture need to be implemented?
- Who do you need to get on board?
- How will you keep your follow-up players involved in the planning, design, and delivery of staff development?
- How will you identify follow-up players' needs for support in this process?
- How will you reward/compensate them?

- How will you advertise the follow-up throughout the organization and make sure its role in supporting staff development is understood?
- What checkpoints for follow-up implementation will be developed?
- What criteria for measuring success will be established?

Strategies for Conducting Follow-Up

There are several ways an organization can ensure support and assistance for staff development participants. Listed below are some examples you should consider. But don't feel constrained by these suggestions. Be creative and generate other alternatives:

- peer coaching
- problem-solving groups
- courses outside the organization
- in-house training
- collegial circles
- mentoring
- resident experts
- newsletters.

Remember, the follow-up needs to fit **your** organization and **your** staff development purpose. A monthly newsletter of tips, ideas, and resources might not be the type of support your organization needs if your participants usually receive tons of mail and see each other at weekly meetings. However, it might be quite helpful for participants spread out over a large geographic area having little contact with one another.

In selecting a method remember cost, feasibility, the profile of participants, organizational culture, and time. Most importantly, remember that the staff development process goes far beyond the learning event and is much more powerful when supported with effective follow-up assistance. Write down the follow-up method or methods you have selected in **Worksheet 6 - Follow-Up Support Guide**.

Worksheet 6

Follow-Up Support Guide

Planning the Follow-Up

1. What provisions need to be made in the organization to establish follow-up assistance?

   _____

   _____

   _____

2. What changes in thinking, perceptions, and organizational culture need to be implemented?

   _____

   _____

   _____

3. Who do you need to get on board?

   _____

   _____

   _____

4. How will you keep your follow-up players involved in the planning, design, and delivery of staff development?

   _____

   _____

   _____

5. How will you identify follow-up players' needs for support in this process?

   _____

   _____

   _____

Worksheet 6 - Follow-Up Support Guide (continued)

6. How will you reward/compensate them?

_____

_____

_____

7. How will you advertise the follow-up throughout the organization and make sure its role in supporting staff development is understood?

_____

_____

_____

8. What checkpoints for follow-up implementation will be established?

_____

_____

_____

9. What criteria for measuring success will be established?

_____

_____

_____

Strategies for Conducting Follow-Up

10. What follow-up method(s) have you selected?

_____

_____

_____

VII. Summative Evaluation

In earlier sections you grappled with how to create and maintain the staff development process. You took time to address the purpose, needs, goal, objectives, design and delivery, formative evaluation, and follow-up support. Now it is time to look at the process overall and assess its outcomes and its contribution to organizational and individual growth.

Summative evaluation provides an opportunity for being retrospective. Unlike formative evaluation, summative evaluation comes at the end of the process and is conducted as a final assessment. So, let us take a look at how summative evaluation can help review and give closure to the staff development process.

The Intent of Summative Evaluation

The intent of summative evaluation is to ask questions aimed at summing up process results. Summative evaluation seeks to determine overall effectiveness from a global perspective and it provides input for the future. Let's consider an example. As superintendent of a small school district, you have just completed a four-year staff development process. During the four years, every teacher in the district participated in training and follow-up on utilizing classroom management skills. During the first year, all elementary school teachers began the program. During the second year, middle school teachers started. High school teachers began the third year. Throughout the four-year period, you conducted formative evaluations and made appropriate adjustments. There are many other topics you hope to address in the future, and, being committed to ongoing staff development, you are interested in planning additional events. The end of the four-year project is the time to step back, review the process, and conduct a summative evaluation.

As with formative evaluation, you need to decide what your purpose is for conducting this summative evaluation. Ask yourself, "What is it I need to know about the entire process that will help me understand how effective it was?" Use **Worksheet 7 - Summative Evaluation Guide** to consider and record your answer. After you have formulated your purpose, you need to clarify the steps in the summative evaluation process and check the methods available. Let's take a look at ways you can undertake a summative evaluation process.

Summative Evaluation Methods

Previous sections have reviewed the various evaluation methods that are available. These methods may also be used in a summative evaluation process.

The important difference is the focus of the questions asked. Summative evaluation is interested in major results, a global perspective, long-range outcomes, the total picture, and the contemplation of future staff development efforts.

As in formative evaluation, the first step in method selection is to take a look at the staff development process and decide what is most important to assess through this final evaluation. Think about the questions below and write your answers in **Worksheet 7 - Summative Evaluation Guide**:

- Do you want to know what theories and skills were learned?
- Do you want to know what changes on the job resulted from the use of the theories or skills?
- Do you want participants' feedback?
- Do you want to know results in productivity, effectiveness, or efficiency?
- Do you want to know results in student achievement?

In earlier sections several methods were proposed which also are appropriate for summative evaluation. Review the list below:

- interviews
- observations
- questionnaires
- document analysis
- assessment of organizational climate
- tests of student learning
- debriefing sessions
- focus groups.

The questions below about data collection and analysis are appropriate here, as well. Review them and write your responses in **Worksheet 7 - Summative Evaluation Guide**.

- When will the data be collected?
- Who will collect it?
- How will it be analyzed?
- Who will analyze it?
- How will it be presented to the audience?
- What recommendations will you make based on the results?

Project Summary Report

A fitting closure to the staff development process is a project summary report. This report can serve as a review and synthesis of the entire staff development process. It can also serve to document the work accomplished. Such a report often proves very beneficial. It can be a convincing argument for further development projects. It can be a public relations tool within the organization and within the community, as well. It can also serve as evidence of the time and money spent on staff development.

Writing reports can be intimidating, but using the information you have developed in Worksheets 1 through 7 will help immensely. Your project summary report is a story of how you worked through each section of this publication. It is a story about getting started, assessment and planning, designing and delivering, evaluating, following-up, and summarizing. It also presents conclusions and recommendations for future staff development processes. Using this publication and the worksheet guides as an outline can help you organize your thoughts and make sure the important aspects are included. A Project Summary Report Outline is presented in Figure 2 to illustrate this point.

Figure 2

Project Summary Report Outline

1. Introduction
   - Information on history, rationale, and purpose of staff development within the organization
   - Overview of the staff development process
   - Statement of your staff development purpose
2. Assessment and Planning
   - Steps taken in assessment and planning
   - Rationale for needs assessment
   - Rationale for methodology
   - Steps taken to assess needs
   - Information gathered
   - Statement of goal and objectives
3. Design and Delivery
   - Rationale for selection of instructional methodology
   - Information on the delivery: number of sessions, description of curriculum, participants, and training sites
   - Example of training materials
4. Formative Evaluation
   - Rationale for description of methods used
   - Report on results of evaluation
   - List of program changes made as a result of evaluation

Figure 2 (continued)

5. Follow-Up Support
    - Description of follow-up events
    - Report on outcome of follow-up events
6. Summative Evaluation
    - Rationale for and description of methods used
    - Report on results of evaluation
    - Conclusion
    - Recommendations for future staff development

Worksheet 7

Summative Evaluation Guide

The Intent of Summative Evaluation

1. What is it you need to know about the entire process that will help you understand how effective it was?

2. What is your purpose for summative evaluation?

Summative Evaluation Methods

3. Do you want to know what theories and skills were learned?

4. Do you want to know what changes on the job resulted from the use of the theories or skills?

Worksheet 7 - Summative Evaluation Guide (continued)

5. Do you want participants' feedback?

6. Do you want to know results in productivity, effectiveness, or efficiency?

7. Do you want to know results in student achievement?

8. Which evaluation methods will you use?

9. When will the data be collected?

10. Who will collect it?

_____

_____

_____

11. How will it be analyzed?

_____

_____

_____

12. Who will analyze it?

_____

_____

_____

13. How will it be presented to the audience?

_____

_____

_____

14. What recommendations will you make based on the results?

_____

_____

_____

A Final Note

You have read our staff development workbook and reviewed its recommended process and steps. Now, it is time for you to apply what you have learned. Being committed to expanded principles of staff development and being armed with a comprehensive process should help you get off to a good start. Good luck with your endeavor!

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